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Beer prices spring a leak

Discounts abound as fight for share becomes fierce

By Ira Teinowitz

The battle for beer sales has turned into an unprecedented price war.

In markets across the country, price levels are falling dramatically and consumers are being treated to a slew of discounts, instant discount coupons and mail-in rebates.

The promotions aren't everywhere or uniform, but the number of markets seeing price cuts and the extent of the promotions appear to be up sharply from last year, wholesalers say.

"Everyone is fighting and clawing for business, trying to figure out a new way to get their shares up," said Hal Perry, VP-sales and marketing for Phoenix Distributing Co., a Phoenix, Ariz., distributor of Stroh Brewery Co. and S&P Co. products (Pabst Blue Ribbon and Hamm's).

"They are doing crazy things," added Mike Doyle, general sales manager for Louis Glunz Beer, a Chicago area Stroh and S&P distributor.

Some distributors speculate that brewers are willing to trim profits because they've fallen short of sales goals and are trying to recover.

Others suggest brewers are using the cuts to woo chains in the growing number of distribution channels—supermarkets, drugstores, discounters, convenience stores and warehouse clubs—into advertising their products.

Some analysts argue that the recession isn't over and price is still a driving force behind purchase decisions for many products, beer included.

Whatever the reasons, Nielsen Marketing Research's ScanTrak data on grocery stores show that while sales of all premium-price beers (such as Budweiser) rose 7.6% for the 52 weeks ended June 13, sales of retailer-advertised premium beers rose 10%.

Wholesalers say beer pricing in some markets this summer has begun to resemble

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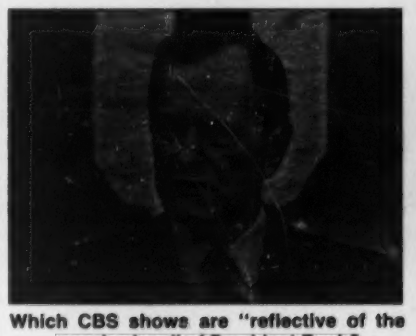

Which CBS shows are "reflective of the moral values" of President Bush?

Bush buy becomes morality play at CBS

By Joe Mandese

The Bush-Quayle re-election campaign is battling CBS over the moral values of the TV programs its political ads will interrupt, in what could be billed as "Murphy Brown vs. Dan Quayle—the Sequel."

CBS is objecting to requests from the Bush-Quayle ad team that the network determine which programs are "in good taste" and "reflective of the moral values of the president" before ad buys are made.

The written requests were made by Mark McLaughlin, media director for the ad team, known as the November Co. Mr. McLaughlin said he only wanted information on programs "whose subject matter is in good taste and reflective of the moral values of the president."

In mid-June Mr. McLaughlin also requested information from the Big 3 TV networks on the availability and pricing of commercial units intended to run between mid-July and mid-August.

His requests followed Vice President Quayle's garnering headlines nationwide for singling out the CBS hit "Murphy Brown" as contributing to a decline in family values.

Possibly as a result of that incident, CBS objected to Mr. McLaughlin's request and argued that it wasn't the network's responsibility to determine which of its shows were acceptable to President Bush.

"We cannot and will not take responsibility for determining which of our shows you might consider 'reflective' or non-reflective of the president's moral values," CBS VP-Administration Mary Lou Jennerjahn wrote in a letter to Mr. McLaughlin.

She added that such determinations must be made by the campaign committee and asked Mr. McLaughlin to advise CBS of the campaign's criteria for programming that

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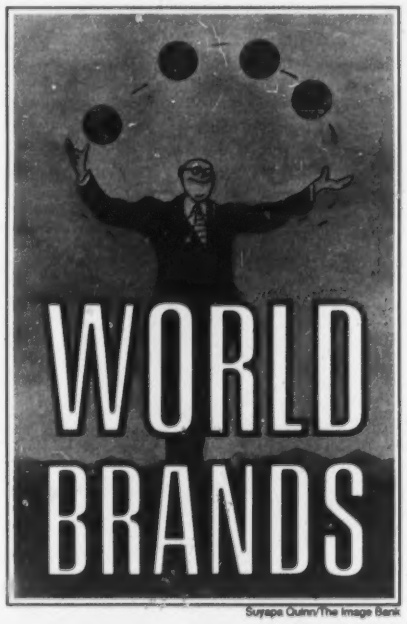

Suyapa Quinn/The Image Bank

LAST MINUTE NEWS

Wieden not on way out: Subaru

CHERRY HILL, N.J.—Subaru agency Wieden & Kennedy and its unconventional ad approach are in no immediate danger despite the departure last week of Thomas Gibson as president-chief operating officer of Subaru of America. Mr. Gibson's duties are temporarily being taken over by Takeshi Higurachi, chairman-ceo, who was already on board when the importer hired the Portland, Ore.-based agency last year for its $60 million account. "I honestly don't see [Mr. Gibson's departure] having an effect on our agency relationship," said Chris Wackman, VP-marketing at Subaru. Mr. Gibson took the new post of president-ceo at SMG, a Philadelphia facilities management company. For the first five months of 1992, Subaru car sales of 41,235 units represented a 6.6% drop from the same period in 1991.

Mexicana drops JWT, embraces D'Arcy

MEXICO CITY—Mexicana Airlines last week fired J. Walter Thompson USA, Los Angeles, and hired D'Arcy Masius Benton & Bowles, New York, to handle its $20 million U.S. account. People close to Mexicana said the account switch was a belated reaction by new CEO Ricardo Garcia Sainz and Pedro Dornheim, the airline's

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P&G enters new toothpaste war

Crest muscles into growing baking soda segment with first 'satisfaction guaranteed' test in Arizona

By Jennifer Lawrence and Riccardo A. Davis

Procter & Gamble Co. is about to move into high gear with an all-out assault on the baking soda segment of the toothpaste category.

This week, P&G starts the first market test of Baking Soda Crest toothpaste in Arizona, as the company tries to make up lost ground in the $1.1 billion toothpaste market by moving into its fastest growing segment.

Details of the marketing plan, which P&G confirmed, indicate the consumer products giant will focus advertising on the baking soda-clean feeling and mint taste after brushing.

Advertising from D'Arcy Masius Benton & Bowles, New York, will also stress the cavity prevention qualities of the Crest formula in an attempt to leverage the Crest name. P&G's plans for the test hinge on using Crest's overall leadership position as a unique selling proposition for its baking soda extension.

The TV campaign will probably start in August and call for P&G to reach 84% of households more than six times a month.

Plans call for Baking Soda Crest to be sold in "clean mint flavor" in 6.2-ounce, 4.4-ounce and 0.85-ounce tubes.

A free standing insert will drop in Arizona markets on July 26, which could tie in with Crest's Olympic sponsorship.

P&G will face Church & Dwight Co.'s Arm & Hammer Dental Care and its new Tartar Control Dental Care, the leading baking soda toothpaste products. Colgate Baking Soda toothpaste rolled national earlier in the year, and Chesebrough-Pond's, a Unilever subsidiary, has Mentadent, a baking soda and hydrogen peroxide toothpaste.

Toothpaste shares in Arizona

Arm & Hammer's share grew dramatically in 1991.

Brand	'91 share	% chg vs. '90
Crest	35.5	+12
Colgate	20.7	+1
Aqua Fresh	13.0	+18
Arm & Hammer	8.4	+87

Source: A.C. Nielsen Co.

This makes P&G the fourth major marketer to enter the fray, and the battle is likely to be fought tooth and nail.

A key element in generating trial will be a

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Hal Riney says Perot work is over for now

By Steven W. Colford and Alice Z. Cuneo

The dream union of independent presidential candidate Ross Perot and adman Hal Riney is off, at least temporarily.

And, so too, is the likelihood that TV screens in the near future will be blasting out "Perot for president" ads, Mr. Riney said.

Mr. Riney last week said he and others from his San Francisco-based agency had completed their political film work for the Texas billionaire and had no assurances that Mr. Perot or his team would ask them back for more campaign work.

Contradicting several printed reports, Mr. Riney, the chairman of Hal Riney & Partners, denied having agreed to be the campaign's agency of record until Election Day, Nov. 3.

"I'm tired of these stories," he said, at the same time conceding the agency had "enjoyed all the free publicity."

Mr. Riney and a partner, Jim Travis, were among a handful of agency officials who, at the request of campaign manager Ed Rollins, filmed several Perot rallies, speeches and appearances in California, Dallas and Boston. Both have known Mr. Rollins at least since 1984, when all three worked for President Reagan.

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The Riney footage was expected to be used for campaign commercials; some, in 60-second and 5-minute formats, was previewed last week in Dallas for campaign workers, who came away raving about what they'd seen.

As for Perot ads, whether by Riney or anyone else, Mr. Riney said he didn't expect to see any soon.

"There's nothing else to shoot that I know of," he said. "Ed Rollins would like to have us involved, but I got the very distinct sense Perot has no plans for advertising in the near future. [Perot] certainly has been getting enough free [airtime] on TV. I'm not sure he needs advertising at the moment."

If and when Mr. Perot is ready for advertising, however, Mr. Riney said he will at least be willing to listen.

"We'd talk about it," he said.

Mr. Perot is believed to prefer waiting until as late as possible in the campaign before unleashing his barrage of campaign spots. That would maintain his image as a non-politician who needs neither handlers nor sound bites to reach the American voter.

That conflicts, however, with the view of some high-level campaign aides who believe Mr. Perot needs to start advertising soon to deflect the spate of critical news stories that have cost him points in recent popularity polls.

Mr. Riney said he and his crews

(Continued on Page 36)

Publicis nabs $40M Club Med account

By Bruce Crumley

PARIS—Club Mediterranee, the worldwide vacation operator, awarded its $40 million European ad account without competition to Publicis after pulling the account from RSCG.

Despite indications the move was made over a conflict issue (RSCG handles Air France's European account), an agency executive said Club Med simply felt it was time for change.

RSCG's latest campaign was themed "The good life if I want it."

Publicis, which lost the Air France account to RSCG this spring, has been in contact with Club Med since the agency pitched the account against RSCG in 1986 and repitched it in 1990.

"We have been talking to Club Med since the very close competition in 1986," Publicis President Maurice Levy said. "We have continually shown them what we've been doing, how we can serve clients' needs and how we've been developing. We made certain we were never really out of the running—even after they had selected another agency."

While Mr. Levy said he can't comment on why Club Med made the switch, he did confirm that the 15-country European campaign will kick off early next year. □

Top Yankelovich execs ousted

Clancy, Shulman out as Saatchi sells researcher

By Gary Levin

New owners are in control at Yankelovich Clancy Shulman, and they've abruptly dismissed Messrs. Clancy and Shulman as the research company's two top executives.

The ousted executives last week said they will soon form a noncompetitive marketing consultancy.

Chairman Kevin J. Clancy and President-CEO Robert S. Shulman, both well-known figures in the research industry, were fired immediately after Saatchi & Saatchi Co.'s sale of the Westport, Conn.-based company late last month to Wand Partners, a New York investment company, for $10.6 million.

They were replaced by Richard M. Clarke, 60, the new chairman, who also remains chairman of Akzo America, a diversified manufacturer, and by James A. Taylor, 44, as president-ceo, from national director of marketing for Ernst & Young, an accounting firm. Both are members of the Wand investor group.

Mr. Clancy denied a report he was escorted out of Yankelovich offices by security guards, saying he and Mr. Shulman were visiting a client when the new owners announced the management shake-up.

Clancy

Shulman

He said Wand allowed the two to return to their offices and reclaim personal possessions.

Mr. Shulman couldn't be reached for comment.

Mr. Taylor labeled "completely untrue" the report that Messrs. Clancy and Shulman were escorted off the premises, saying Saatchi officials informed them of the sale and new management.

Mr. Clancy acknowledged circumstances surrounding the takeover were "unusual" but described relations with Wand as cordial. He said Wand is honoring his and Mr. Shulman's employment contracts, although neither executive will provide any services to Yankelovich.

Mr. Taylor said a name change for the company, now operated as a partnership, is "under serious discussion," but he added that the name of Daniel Yankelovich, a co-founder who left several years ago, will continue to be used.

The company, which operates as Yankelovich Clancy Shulman though its legal name is Yankelovich, Skelly & White/Clancy Shulman, was sold to London-based Saatchi in 1986. Since 1988, it's de-emphasized conventional research while increasing its focus on marketing consulting, Mr. Clancy said.

Mr. Taylor said he expects Yankelovich to expand its basic research operation by coordinating it with database and strategic marketing initiatives. He said Yankelovich will add new elements to its Monitor series and will further develop its consumer polling operation.

The company gave the research industry somewhat of a black eye in 1987, when Beecham Group filed a $24 million lawsuit against Yankelovich charging negligence, professional malpractice and breach of contract.

The suit could have had broad implications for a research company's liability if it had come to trial, but the case was settled the next year. □

Big ad $ boosts seen in leisure

LINCOLNSHIRE, Ill.—Many industries concerned with leisure-time activities will record double-digit percentage increases in ad spending this year, according to forecasts by Schonfeld & Associates.

Schonfeld has issued the 16th edition of its annual study, "Advertising Ratios & Budgets," covering more than 5,600 companies and more than 400 industry sectors.

The accompanying table shows estimated 1992 ratios for 200 industries, grouped by the government's Standard Industrial Classification codes.

Schonfeld forecasts 31.2% growth in ad spending for the videotape rental category; 20.6% for album, tape and compact disc marketers; 13.1% for movie and video production companies; 12.8% in the amusement and recreation services category; 12.1% for games and toys; 11.8% for dolls and stuffed toys; and 9.2% for cable and pay TV services.

Other categories seen heading for major percentage increases in ad expenditures are: canned fruit and vegetable and jams and jellies category, up 45%; periodical publishers, up 26.2%; and 10.6% for catalog and mail-order houses.

The study also forecasts 10% or better increases in several computer categories, including a 16% jump for prepackaged software marketers. Health-related industries and many retail categories likewise will show significant ad spending growth, Schonfeld predicts.

Besides advertising-to-sale ratios, the study forecasts 1993 ad spending for each company and industry. It also includes sales growth rates as well as advertising growth rates by company.

Industries to watch in 1993, Schonfeld says, include airlines and hotels, where ad spending will grow less than in past years, only 6.8% and 3%, respectively. But many health service providers will continue double-digit growth rates.

Department store chains will spend $4.3 billion in 1993, according to the Schonfeld forecasts. Variety store chains will show stronger advertising growth of 6.4% and increase spending to $2.9 billion.

In the study, budgets are grouped to show all competitors within an industry. The study is compiled from sources including the 10-K reports of publicly held companies. Since reporting may vary from company to company, careful use of the findings is advised.

Eugene P. Schonfeld, author of the study, urges caution because: financial events such as mergers, acquisitions and divestitures may distort spending patterns; private ownership of very large companies in specific industries may mean that some advertisers are omitted; and multi-industry companies are reported only in their primary industry, based on sales in their dominant line of business.

Data from the study are also available on diskette for personal computers and on computer tape. Copies of the 203-page study are available for $325 from Schonfeld & Associates, 1 Sherwood Drive, 60069. Phone: (708) 948-8080. □

Advertising-to-sales ratios, 1992

Computed by industry.

Industry	SIC no.	Ad dollars as percent of sales	Ad dollars as percent of margin	Annual growth rate (%)
Adhesives & sealants	2891	2.7	5.8	5.8
Advertising	7310	0.3	3.3	6.6
Advertising agencies	7311	0.2	1.5	9.6
Agriculture chemicals	2870	0.9	4.3	1.1
Agriculture production-crops	100	2.4	7.3	5.4
Air cond, heating, refrig equip	3585	1.8	6.7	-3.2
Air courier services	4513	1.3	11.4	10.6
Aircraft & parts	3720	0.6	3.2	3.1
Amusement & recreation svcs	7900	4.4	14.0	12.8
Apparel & accessory stores	5600	1.9	5.0	8.8
Apparel & other finished prods	2300	4.5	12.4	9.4
Auto & home supply stores	5531	1.7	5.8	6.7
Auto rent & lease, no drivers	7510	2.4	3.6	4.2
Bakery products	2050	8.2	19.6	1.2
Beverages	2080	9.5	14.1	7.0
Biological pds, ex diagnstics	2836	1.2	1.9	26.4
Blankbooks, binders, bookbind	2780	2.0	3.8	6.7
Bldg matl, hardwr, garden-retail	5200	3.0	8.4	-11.6
Books: pubg, pubg & printing	2731	3.2	5.8	6.3
Brdwoven fabric mill, cotton	2211	3.0	15.0	-0.8
Brdwovn fabric manmade, silk	2221	2.6	6.0	-48.7
Btld & can soft drinks, water	2086	3.1	6.7	7.6
Cable & other pay TV svcs	4841	1.7	3.1	9.2
Calculate, acct mach, ex comp	3578	1.8	4.2	7.3
Can fruit, veg, preserv, jam, jel	2033	3.0	11.6	45.0
Can, frozen presrv fruit & veg	2030	7.3	19.0	7.4
Catalog, mail-order houses	5961	6.9	17.6	10.6
Chemicals & allied pds-whsl	5160	1.8	7.0	8.5
Chemicals & allied prods	2800	2.6	6.6	11.7
Cigarettes	2111	3.5	6.1	2.4
Comput integrated sys design	7373	1.2	3.8	1.7
Comput processing, data prep svc	7374	1.6	3.1	6.6
Communications equip, NEC	3669	2.4	5.6	8.3
Computer communication equip	3576	2.0	3.7	10.8
Computer peripheral eq, NEC	3577	2.9	6.1	15.4
Computer storage devices	3572	1.2	4.7	17.6
Computer terminals	3575	4.3	13.7	-16.9
Computer & office equipment	3570	1.5	3.4	5.9
Computer & software-whsl	5045	0.9	6.4	17.6
Construction-special trade	1700	2.2	6.6	14.0
Convert paper, pprbrd, ex boxes	2670	2.3	5.3	4.7
Cutlery, hand tools, gen hrdwr	3420	10.1	19.4	6.2
Department stores	5311	2.8	14.3	4.0
Dolls & stuffed toys	3942	15.5	29.8	11.8
Drug & proprietary stores	5912	1.4	5.2	2.8
Drugs & proprietary-whsl	5122	0.1	0.7	6.7
Eating places	5812	3.4	17.4	6.2
Educational services	8200	6.1	15.3	4.6
Elec measure & test instruments	3825	2.3	4.5	-0.8
Electric housewares & fans	3634	4.9	15.0	-3.3
Electric lighting, wiring equip	3640	2.4	7.6	-1.1
Electromedical apparatus	3845	1.3	2.2	14.7
Electronic components, NEC	3679	0.9	3.0	8.4
Electronic computers	3571	2.8	5.9	-1.9
Electronic parts, eq-whsl, NEC	5065	2.2	8.7	3.3
Electr, other elec eq, ex comput	3600	2.0	6.7	6.7
Engines & turbines	3510	1.1	6.8	-0.1
Engr, acct, resh, mgmt, rel svcs	8700	0.9	4.2	4.9
Equip rental & leasing, NEC	7359	3.3	5.3	6.2
Fabricated rubber prods, NEC	3060	0.7	3.1	4.9
Fabricated structural metal	3440	0.7	3.3	-3.3
Family clothing stores	5651	2.3	6.7	11.5
Farm machinery & equipment	3523	0.7	3.7	2.1
Finance-services	6199	0.7	7.2	4.9
Food & kindred products	2000	4.7	15.0	6.8
Footwear, except rubber	3140	4.1	11.0	7.0
Furniture stores	5712	8.6	18.7	6.1
Games, toys, child veh, ex dolls	3944	14.6	31.1	12.1
Gen med & surgical hospitals	8062	0.9	6.0	4.6
Gen industrial mach & eq, NEC	3569	0.4	1.4	0.8
General industrial mach & eq	3560	2.0	6.7	4.4
Glass, glassware-pressed, blown	3220	1.2	2.7	-6.6
Grain mill products	2040	8.9	17.6	6.4
Greeting cards	2771	3.3	5.2	9.4
Groceries & related prods-whsl	5140	1.3	9.2	2.3
Grocery stores	5411	1.3	5.0	4.4
Gaskets, hose, bldng-rubr, plstc	3050	1.6	4.3	10.7
Guided missiles & space vehicles	3760	1.5	8.8	1.3
Hardware, plumb, heat eq-whsl	5070	5.6	63.6	-4.8
Help supply services	7363	1.9	9.5	1.2
Hobby, toy & game shops	5945	1.6	5.5	7.4
Home furniture & equip stores	5700	4.9	15.3	11.6
Home healthcare services	8082	0.8	1.7	21.6
Hospital & medical svc plans	6324	1.2	6.2	21.7
Hospitals	8060	4.8	21.1	2.6
Hotels, motels, tourist courts	7011	3.2	11.8	3.0
Household appliances	3630	2.5	8.4	11.6
Household audio & video equip	3651	4.9	13.0	13.7
Household furniture	2510	4.3	15.8	-5.8
Ice cream & frozen desserts	2024	3.0	10.5	14.9
In vitro, in vivo diagnostics	2835	2.1	4.8	14.6
Indl inorganic chemicals	2810	0.4	1.0	-1.9
Indl trucks, tractors, trailers	3537	1.0	5.1	3.3
Industrial measurement instr	3823	1.2	3.2	3.1
Industrial organic chemicals	2860	0.5	3.5	-13.4
Ins agents, brokers & service	6411	0.3	1.4	7.8
Investment advice	6282	7.3	19.0	8.5
Jewelry stores	5944	3.2	11.3	12.4
Jewelry, precious metals	3911	4.3	10.4	10.0
Knit outerwear mills	2253	1.6	5.3	12.5
Knitting mills	2250	5.0	15.5	5.2
Lab analytical instruments	3826	2.0	3.5	7.2
Lawn, garden tractors, equip	3524	1.3	4.9	8.5
Lumber & other bldg matl-retail	5211	1.6	6.0	4.3
Machine tools, metal cutting	3541	1.1	4.4	1.3
Magnetic, optic recording media	3695	3.2	7.8	5.1
Malt beverages	2082	5.0	15.7	4.9
Management services	8741	1.1	5.7	12.9
Meas & controlling dev, NEC	3829	1.2	3.4	11.9
Meat packing plants	2011	1.6	11.9	9.6
Men, youth, boys frnsh, work clthg	2320	3.0	9.0	5.5
Metal forgings & stampings	3460	1.1	3.7	1.2
Metalworking machinery & equip	3540	3.3	8.1	12.4
Misc amusement & rec services	7990	6.3	18.6	10.0
Misc business services	7380	1.5	2.7	7.4
Misc chemical products	2890	8.2	18.5	8.0
Misc elec machine, equip, supplies	3690	2.9	5.9	11.7
Misc fabricated metal products	3490	0.8	2.9	-4.5
Misc food preps, kindred prods	2090	2.5	6.0	4.3
Misc furniture & fixtures	2590	1.2	2.2	4.7
Misc general merch stores	5399	3.9	15.6	2.1
Misc indl, coml, machine & equip	3590	1.4	3.1	6.1
Misc manufacturing industries	3990	3.3	8.5	8.5
Misc shopping goods stores	5940	4.0	9.4	4.7
Misc transportation equipment	3790	5.3	24.5	16.8
Motion picture theaters	7830	3.2	15.2	-12.4
Motion pict, videotape distrib	7822	6.0	14.9	18.9
Motion pict, videotape production	7812	13.8	20.6	13.1
Motor homes	3716	1.3	7.1	-5.8
Motor veh parts, supply-whsl	5010	1.0	6.4	-8.2
Motor vehicle parts, accessories	3714	0.9	3.7	-2.2
Motor vehicles & car bodies	3711	2.5	25.4	9.3
Motorcycles, bicycles & parts	3751	1.3	5.4	8.3
Motors & generators	3621	0.6	2.0	2.9
Newspaper: pubg, pubg & print	2711	4.3	12.4	7.2
Office furniture	2520	1.1	2.9	0.0
Office machines, NEC	3579	1.5	5.1	9.5
Offices of medical doctors	8011	1.3	5.7	13.7
Operative builders	1531	1.2	14.2	-7.8
Operators-non-res buildings	6512	2.4	6.7	3.0
Ophthalmic goods	3851	9.1	15.0	12.5
Ordnance & accessories	3480	1.1	4.9	-2.1
Ortho, prosth, surg appl, supply	3842	2.4	4.5	8.3
Paints, varnishes, lacquers	2851	2.6	6.9	11.8
Paper mills	2621	1.7	6.3	6.5
Paper & paper products-whsl	5110	2.4	10.8	18.5
Patent owners & lessors	6794	2.1	10.4	6.0
Pens, pencils, other office matl	3950	6.6	14.5	6.4
Perfume, cosmetic, toilet preps	2844	10.7	17.1	2.2
Periodical: pubg, pubg & print	2721	6.4	14.5	26.2
Personal credit institutions	6141	1.2	3.1	3.5
Personal services	7200	1.8	7.6	4.2
Petroleum refining	2911	0.9	4.6	3.4
Pharmaceutical preparations	2834	5.8	8.3	7.1
Phone comm ex radiotelephone	4813	1.9	4.1	8.0
Phono records, audiotape, disc	3652	11.9	25.4	20.6
Photofinishing laboratories	7384	6.0	14.4	1.4
Photographic equip & supply	3861	3.9	9.1	8.0
Plastic matl, synthetic resin	2820	1.4	4.9	5.7
Plastics products, NEC	3089	2.4	6.1	5.7
Plastics, resins, elastomers	2821	1.0	3.5	1.9
Pottery & related products	3260	3.8	8.0	-1.6
Poultry slaughter & processing	2015	2.2	13.4	9.9
Prepackaged software	7372	3.6	5.4	16.0
Printing trades machy, equipment	3555	1.8	4.2	16.8
Prof & coml equip & supply-whsl	5040	2.1	6.8	6.6
Pumps & pumping equipment	3561	1.1	3.7	4.6
Radiotelephone communication	4812	2.8	5.9	18.3
Radio, TV broadcast, comm equip	3663	1.1	3.2	7.4
Radio, TV, cons electronic stores	5731	4.7	18.9	4.5
Real estate investment trust	6798	0.5	0.7	5.3
Refrig & service ind machine	3580	1.9	5.2	1.6
Retail stores	5990	5.9	26.4	7.2
Rubber & plastics footwear	3021	7.8	20.2	15.1
Sausage, other prepared meat prods	2013	8.2	23.3	7.9
Savings institns, fed chartered	6035	0.8	3.3	-3.3
Security brokers & dealers	6211	2.7	14.9	-0.1
Semiconductors, related devices	3674	1.3	3.1	10.9
Shoe stores	5661	4.0	10.8	7.7
Skilled nursing care facilities	8051	1.6	17.0	-0.9
Soap, detergent, toilet preps	2840	8.7	20.1	9.9
Special cleaning, polish preps	2842	14.7	26.0	7.9
Special industry machinery	3550	4.8	19.9	5.2
Special industry machinery, NEC	3559	1.1	2.6	2.7
Sporting & athletic goods, NEC	3949	3.4	9.4	-10.4
Search, detect, nav, guide, aero sys	3812	0.4	1.9	1.3
Sugar & confectionery products	2060	11.2	27.7	9.6
Surgical, med, instr, apparatus	3841	1.4	2.6	15.8
Svcs to dwellings, other bldgs	7340	1.7	6.1	5.7
Tele & telegraph apparatus	3661	1.2	2.3	16.8
Television broadcast station	4833	3.2	11.2	8.9
Tires & inner tubes	3011	3.3	12.2	0.3
Unsupp plastics film & sheet	3081	2.9	8.9	-2.8
Variety stores	5331	1.6	7.1	6.4
Videotape rental	7841	4.2	8.3	31.2
Water transportation	4400	7.6	19.7	9.2
Women, miss, child, infant undergmnt	2340	5.3	12.3	5.0
Women's clothing stores	5621	3.7	9.7	9.5
Women, misses, jrs outerwear	2330	2.8	9.3	15.1
Wood hshold furn, ex upholstered	2511	4.2	13.0	10.9

Source: Schonfeld & Associates, 1 Sherwood Drive, Lincolnshire, Ill. 60069. (708) 948-8080. Legend: SIC – Standard industrial classification. NEC – Not elsewhere classified. Ad dollars as percent of sales: Ad expenditures/net sales. Ad dollars as percent of margin: Ad expenditures/(net sales – cost of goods sold). Annual growth rate of advertising dollars.

AGENCIES WITH OFFICES IN MORE THAN 31 COUNTRIES

BACKER SPIELVOGEL BATES WORLDWIDE

Clients:	The Americas: U.S.	Canada	Argentina*	Brazil*	Chile*	Colombia*	Mexico	Peru*	Uruguay*	Venezuela*	Europe: Austria	Belgium	Central Europe**	Denmark	Finland	France	Germany	Greece	Ireland	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland*	U.K.	Nigeria*	South Africa	Asia/Pacific: Australia	China	Hong Kong	Indonesia	Japan	Malaysia	New Zealand	Singapore	South Korea	Taiwan	Thailand
Air New Zealand																																					●	●	●		
Alberto Culver						●																										●			●			●		●	
Alamis																●	●			●				●			●														
Avis	●	●																												●						●	●			
B.A.T.		●										●	●			●		●		●				●			●		●			●	●	●		●	●		●	●	●
Campbell Soup	●			●	●				●	●																														
Carter-Wallace	●	●																						●						●											
Caterpillar			●									●	●		●	●	●	●		●	●	●	●	●	●	●	●													
Ceretoos																																●	●		●		●				
CPC Intl.	●	●					●						●	●	●			●	●					●																	
DHL						●					●		●		●		●			●								●				●						●	●		
Electrolux													●	●			●			●				●			●														
Eveready Batteries		●	●	●	●	●			●																						●			●	●	●		●		
Fisher-Price		●							●				●		●	●		●	●								●														
Hattori Seiko	●					●			●																										●						
HongkongBank																																	●			●		●	●		
Hyundai	●	●																																			●	●		●	
IBM/Lexmark												●	●		●	●	●	●			●	●	●		●	●	●														
Italian Tourist Board												●	●		●	●	●	●			●	●	●		●	●	●														
Johnson & Johnson															●	●				●				●																	
Estee Lauder	●																●																●	●	●						
LM Ericsson	●	●		●	●	●		●	●		●				●	●		●			●		●		●	●	●											●	●		
Mars Confectionery	●	●									●	●	●	●	●	●	●	●			●	●	●	●	●	●	●				●		●	●	●	●			●	●	
Pet food	●	●									●	●	●	●	●	●	●	●			●	●	●	●	●	●	●				●		●	●	●	●			●	●	
Other	●	●									●	●	●	●	●	●	●	●			●	●	●	●	●	●	●				●		●	●	●	●			●	●	
New Zealand Kiwi												●				●					●	●		●			●								●						
NV Philips	●	●																			●													●							
Omega												●	●		●	●	●	●			●	●	●		●	●	●														
Roche Nicholas												●	●			●	●		●	●	●			●		●		●													
Rover													●				●		●	●	●			●		●														
Spanish Tourism												●	●		●	●	●	●	●	●	●			●		●	●	●													
Tambrands									●																									●		●					
3M						●	●	●				●			●	●	●	●			●	●	●		●	●	●														
UNICEF												●	●		●	●	●	●			●	●	●		●	●	●														
Uniroyal												●			●	●	●		●		●		●	●		●															
Warner-Lambert		●				●																							●							●					
Wellcome	●															●	●	●	●			●			●									●	●				●		

*Non-equity affiliation. **Central Europe includes Czechoslovakia, Poland, Hungary and Yugoslavia. Source: Backer Spielvogel Bates Worldwide

BBDO WORLDWIDE

Clients:	The Americas: U.S.	Canada	Argentina	Brazil	Chile	Colombia*	Costa Rica	Ecuador*	El Salvador	Guatemala	Honduras	Mexico	Nicaragua	Panama	Peru*	Puerto Rico	Venezuela	Europe: Austria	Belgium	C.I.S.	Croatia	Czechoslovakia	Denmark	Finland	France	Germany	Greece	Hungary	Ireland*	Italy	Netherlands	Norway	Poland*	Portugal	Romania*	Spain	Sweden	Switzerland	Turkey	U.K.	Middle East: Cyprus	Egypt	Kuwait	Saudi Arabia	U.A.E.	Asia/Pacific: Australia	China	Hong Kong	India	Indonesia*	Japan*	Malaysia	New Zealand	Pakistan*	Philippines	Singapore	South Korea*	Taiwan	Thailand*
Alfa Romeo																							●	●																●	●																				
Apple Computer	●	●						●										●	●			●	●	●	●	●			●	●						●		●		●						●	●		●			●								●							
Austria Tabak																		●								●												●																									
Bayer/Miles																●	●								●											●																									
Campbell Soup	●	●															●																			●																									
Ciga Hotels																									●	●			●							●																									
CPC International	●	●				●										●						●						●								●																									
Delta Air Lines	●	●										●				●			●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●						●	●		●			●								●							
Eveready/Ralston									●		●	●				●			●	●		●	●	●		●		●								●				●						●	●																			
Federal Express	●	●										●				●																				●																									
General Electric	●	●							●												●																																								
Gillette	●	●		●	●	●	●	●	●	●	●	●				●			●	●			●	●	●	●		●	●	●					●	●	●		●						●																			
Grand Metropolitan	●																			●					●	●			●	●						●																									
Henkel																				●					●	●			●	●						●																									
Hyatt Hotels																																																																			
Intl. Wool Secretariat																				●	●				●	●	●	●	●	●	●					●																									
Johnson & Johnson						●														●					●					●																															
Lucky Goldstar																														●																															
Meridiana																														●	●																														
Mont Blanc																														●	●																													
Nestle		●																												●	●																													
Oral-B	●	●		●	●				●			●				●	●														●																															
PepsiCo Foods	●	●																												●																															
Pepsi-Cola	●		●	●	●	●	●	●	●	●	●	●	●	●		●		●	●	●	●	●	●	●	●	●		●	●	●						●	●	●		●						●	●	●	●			●		●	●							
NV Philips																														●																															
Pizza Hut	●						●			●			●																	●																															
Polaroid	●	●						●																																																						
Rhone-Poulenc	●	●		●																										●																															
Rothmans International																																																															
Sara Lee																														●																															
Scott Paper																														●																															
Tambrands	●								●																					●																															
Total Petroleum Preds.																																																													
Unilever	●	●																												●																															
Visa International	●					●	●	●																																																							
Wella					●																																																										
Wm. Wrigley Jr.	●	●																																																										

*Non-equity affiliation. BBDO Marketing, Moscow, Russia, handles all the agency's clients listed under C.I.S. in the chart. Source: BBDO Worldwide

BOZELL

Clients:	The Americas: U.S.	Canada	Argentina*	Brazil*	Chile*	Colombia*	Mexico	Panama*	Puerto Rico	Venezuela*	Europe: Austria*	Belgium	Denmark*	Finland*	France	Germany	Greece	Hungary*	Iceland*	Ireland*	Italy	Netherlands	Poland*	Portugal	Spain	Sweden*	Switzerland*	Turkey*	U.K.	Middle East: Kuwait*	Lebanon*	Oman*	Qatar*	Saudi Arabia*	U.A.E.*	Asia/Pacific: Australia	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand*	Philippines*	Singapore	South Korea	Sri Lanka	Taiwan	Thailand*
Robert Bosch																																								●						●				
Chrysler	●						●					●	●		●	●	●				●	●			●	●			●		●		●	●	●														●		
Courvoisier																																								●										
Hong Kong Tourist Association	●	●														●	●				●			●			●		●							●	●			●	●	●		●	●			●	●	
Merrill Lynch	●	●							●			●				●	●				●			●			●		●							●	●			●				●						
Patek Philippe	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●
Samsung	●			●		●	●	●								●	●	●							●			●									●	●								●	●			●	
Seiko								●																				●									●									●	●				
Singer																●												●									●	●								●	●	●			
Sunkist																																					●									●			●		
Texas Instruments	●											●				●				●		●	●				●									●	●								●					
Unisys	●	●		●			●					●	●			●	●				●				●			●									●	●		●						●			●		

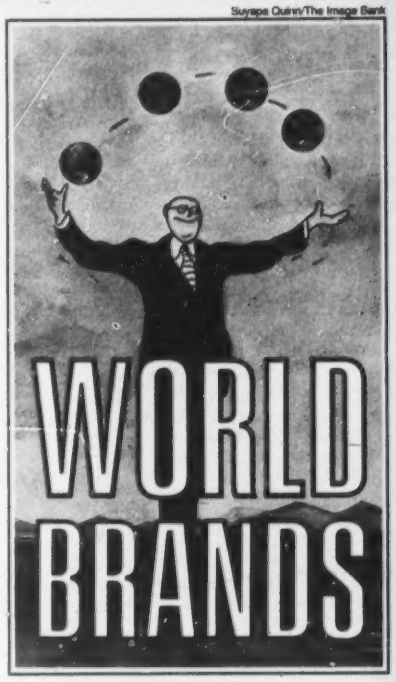
*Non-equity affiliation. Source: Bozell

LEO BURNETT CO.

Clients:	The Americas: U.S.	Canada	Argentina	Brazil	Chile	Colombia	Costa Rica	Dom. Republic	Guatemala	Mexico	Panama	Peru	Puerto Rico	Venezuela	Europe: Belgium	Czechoslovakia	Denmark	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Spain	Sweden	Switzerland*	Turkey	U.K.	Middle East: Egypt	Kuwait	Lebanon	Saudi Arabia	U.A.E.	Asia/Pacific: Australia	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea*	Taiwan	Thailand
BASF				●	●										●		●	●				●				●	●		●									●											
Cathay Pacific		●													●		●	●				●				●	●			●								●	●	●	●	●	●	●	●	●	●	●	●
Fiat															●		●	●			●	●			●		●			●																		
Heinz/Star-kist	●	●											●					●																				●											●
Kellogg	●	●	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●		●		●			●	●	●		●	●						●	●			●				●	●	●	●
Kraft General Foods	●	●													●		●			●							●			●			●	●	●	●					●									
McDonald's	●		●								●					●					●						●			●	●						●						●	●				
Nestle														●				●																															
Philip Morris Cos.	●		●	●	●	●	●	●	●	●	●		●	●	●		●	●	●	●		●			●	●	●	●		●		●	●	●	●	●	●		●			●		●	●	●	●	●
Pillsbury/Green Giant	●	●			●						●				●			●				●				●				●							●											
Procter & Gamble	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Semeonite	●																													●	●																		
Tropicana	●	●														●	●			●		●				●	●			●								●											
United Airlines	●		●	●	●		●			●	●	●			●	●				●									●								●	●			●	●	●			●	●	●
United Distillers	●														●	●	●	●				●				●	●			●				●				●	●			●	●	●				●	

*Non-equity affiliation. Source: Leo Burnett Co.

Suyapa Quinn/The Image Bank



Japan rethinks branding in Europe

By Laurel Wentz

"The Japanese don't know much about what a brand is," Marc Bourgery, vice chairman of FCA International in Paris, told a group of senior Japanese client and agency executives at a Tokyo seminar a month ago.

"Most Japanese companies have very few brands," he said, "and most of the time, the brand is the name of the company."

But now that's changing. The branding of Japanese products in Europe is picking up steam. As Japan steps up its European investments, Japanese marketers are focusing on building powerful brand names rather than just a strong corporate image.

"Traditionally, the company has been the brand in Japan," said Robert Wilk, managing director of Infoplan, a marketing planning, consulting and research division of McCann-Erickson Worldwide in Tokyo. "But now, many companies are at a transitional stage . . . and we're seeing more interest in branding."

Mr. Wilk, who's lived in Tokyo for 25 years, is transferring to London next month as senior VP of McCann-Erickson Europe, to head a new Euro-Japan business unit in London.

Mr. Wilk said he expects to start Japanese marketers developing more brands, and they will be less strongly identified with their companies.

"The way Toyota has developed Lexus is

(Continued on Page S-2)

What these charts show

Advertising Age's eighth World Brands report, showing which accounts agencies handle around the world, used the following criteria:

- Accounts must be served in at least four countries as of June 30, 1992.
- The combined client business must total at least $5 million.

Agencies listing offices in more than 31 countries are included in the report's first section; those in fewer countries are in the second.

Asterisks denote non-equity affiliations. □

Japanese

(Continued from Page S-1)

one instance of this change," he said.

Japanese investment in Europe has grown steadily from $3.5 billion in 1986—when 15.5% of all Japanese overseas investment was in Europe—to $14.3 billion in 1990, or 25.1%, according to Japanese trade group Jetro.

"Japanese companies aware of the upcoming EC integration felt if they didn't invest, they're going to miss the bus," said Megumi Niimura, a Dentsu executive who's also senior vice chairman of CDP Europe, London. Dentsu holds a 40% stake in the agency network.

Despite the heavy investment, Japanese companies approach pan-European marketing from a different perspective.

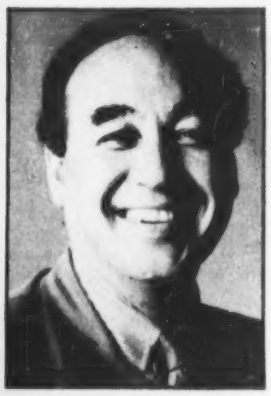
"When you talk about brand advertising, they talk about corporate advertising," FCA's Mr. Bourgery said.

European marketers use advertising to develop the strength of the brand and its name, while the Japanese focus on product innovation and not long-term, consistent brand-building campaigns.

As a result, Japanese marketers "keep changing ad campaigns all the time," Mr. Bourgery said. "You see very few brands with long-term campaigns."

Unified Europe beckons

For many marketers bewildered by Europe's checkerboard of regulations, standards and languages, a unified Europe is the ideal market.



"When you talk about brand advertising, [Japanese companies] talk about corporate advertising."
Marc Bourgery
FCA International

"1992 made companies think maybe Europe will be a market the same as the U.S.," Dentsu's Mr. Niimura said.

With their products now established, Japanese marketers are moving toward pan-European campaigns for their brands, reviewing agency arrangements and delegating more responsibility to European headquarters.

"The Japanese were great exporters," said Andy Fraser, network director of CDP Europe. "But they are making the transition to marketers."

Brands advertised locally

Many Japanese products are still advertised locally in each country, partly because consumer electronics and car marketers rely on distributors that prepare their own local advertising. The parent's lack of control over brand image, positioning and advertising is prompting many to run parallel pan-European campaigns to create a unified image for a brand, Mr. Fraser said.

For example, FCA handles a pan-European campaign for Mazda Motor Corp.'s cars, and Nissan Motor Co. and other Japanese car marketers have similar arrangements.

Brewers make move

Until now, the strongest Japanese brands in Europe have been in consumer electronics, cars, and photography and office equipment, but marketers of other products are showing interest.

A number of Japanese alcoholic beverage marketers are looking seriously at the Continent, said Jim Begg, VP-joint general manager of Eurocom International Brussels, which derives more than 60% of its billings from Japanese clients.

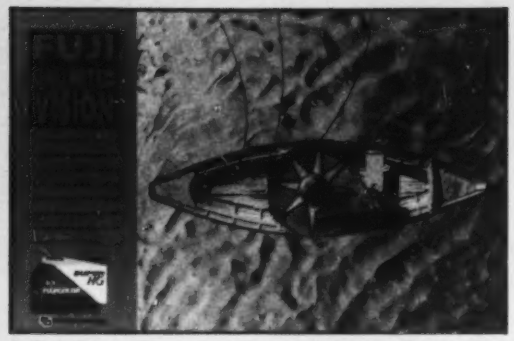
For instance, Japanese beer marketer Asahi plans to introduce Asahi Super Dry beer in the U.K. this summer via U.K. brewer Courage.

Another consumer goods marketer testing European waters is personal-care and house-

(Continued on Page S-4)

DDB NEEDHAM WORLDWIDE

| Clients: | The Americas | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | Europe | | | | | | | | | | | | | | | | | | |



A Fuji Photo Film ad in France links the theme "Fuji unlimited vision" with the image of an eye.

Japanese

(Continued from Page S-2)

hold products giant Kao Corp. The marketer is selling existing brands of two German companies it owns, Guhl Ikebana and Goldwell, in small European hair-care and skincare chains to learn about the European market.

And Shiseido Co. plans its first international fragrance launch from Paris in September with a $10 million marketing budget.

Established marketers are also investing more.

"They're becoming much more brand conscious," Mr. Begg said.

Their willingness to invest and their meticulous attention to detail make them formidable competitors. Mr. Begg said one client, Pioneer Electronic Corp., prepares a 76-page catalog of its Pioneer electronics products for Europe in 17 versions in 10 languages, including separate French-language editions for France, Belgium and Switzerland.

Some marketers are using Japanese diplomacy to find a consensus among distributors about developing their pan-European brands, while a few seek control of the local organizations. Toyota Motor Corp. will gradually acquire majority control of its U.K. distributor by 1998, and last year Nissan resorted to legal action to gain control of its U.K. distributorship.

Samwell

Fuji coordinates advertising

Fuji Photo Film Co. is entering the second stage of its pan-European plan. Peter Samwell is moving to Fuji Europe's headquarters in Duesseldorf this month, in the new post of head of European strategic planning, to develop the second phase of Fuji's ad strategy.

In his previous job as director of the imaging group at Fuji Photo Film (U.K.), he led the selection last year of Saatchi & Saatchi Advertising as Fuji's first pan-European agency, initially a $10 million account for the U.K., Germany and France.

Mr. Samwell will visit Fuji film distributors around Europe and survey how the brand's positioning, marketing and advertising are handled.

"I'll see if there's any way our pan-European concept could be used, and would it benefit them," he said.

The first print work broke last month, and a TV commercial will air next year.

New print ads for France, Germany and the U.K. feature a big logo of green letters on a black background reading "Fuji unlimited vision"; the logo will appear in all print advertising.

The French ads literally link vision with the image of an eye. In one stunning ad, a boat seen from above looks like an eye, complete with eyelashes. The German ads are two pages, one page showing an unusual scene as it appears to the camera and one showing the reality.

Getting the distributors to use the Saatchi work is a little more delicate than if they were all subsidiaries, Mr. Samwell said.

"It's not an automatic rollout," he explained. "Some of them may buy into the idea but without using Saatchi as their agency."

Nissan transfers functions

Many companies are realizing that the traditional practice of directing the marketing of Japanese brands in Europe from headquarters won't work anymore.

Nissan, which spends about 25% to 30% of its $550 million worldwide ad budget in Europe, has transferred marketing, advertising and other functions from Tokyo

(Continued on Page S-5)

FCB PUBLICIS (continued)

Clients:	U.S.*	Canada	Argentina	Brazil	Colombia	Costa Rica	Dom. Republic	Ecuador	El Salvador	Guatemala	Honduras	Jamaica	Mexico	Panama*	Puerto Rico	Trinidad	Venezuela	Austria	Belgium	Cradia*	Czechoslovakia*	Denmark	Finland*	France	Germany	Greece	Hungary*	Ireland*	Italy	Netherlands	Norway	Poland	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	Israel**	Middle East**	Australia	Hong Kong	India*	Indonesia	Japan	Malaysia	New Zealand	Philippines	Singapore*	Taiwan	Thailand
Unilever (Bestfoods, Lipton)	●													●					●				●						●		●				●		●													
Whirlpool																			●				●						●		●				●		●													

*Non-equity affiliation. **Middle East includes Jordan, Kuwait, Lebanon, Saudi Arabia and United Arab Emirates. Source: FCB Publicis

GGK

Clients:	U.S.*	Canada	Austria	Belgium	C.I.S.	Czechoslovakia	Denmark*	Finland*	France	Germany	Greece*	Hungary	Ireland*	Italy	Netherlands	Norway*	Poland	Portugal*	Spain	Sweden	Switzerland	Turkey	U.K.	Congo*	Ghana*	Israel*	Kenya*	Tanzania*	South Africa*	Hong Kong*	India*	Indonesia*	Japan*	Philippines*	Singapore*	Sri Lanka*	Thailand*
Canon			●	●			●	●	●	●				●	●	●			●	●	●		●															
European Quality Alliance									●	●				●									●															
IBM			●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●											
Messe Frankfurt	●		●						●	●				●					●		●		●							●			●				
Porsche Design**	●	●	●	●					●	●				●	●						●		●							●			●				
Skoda			●			●				●								●																			
Swissair			●	●			●	●	●	●	●	●	●	●	●			●	●	●	●	●	●			●	●		●	●	●		●	●	●	●	●
Time Magazine***									●	●													●														
Van Gils			●	●			●								●	●			●	●			●														

*Non-equity affiliation. **ABB, Porsche Design and United Distillers (Johnnie Walker Red and Black, Buchanan's) pan-regional accounts. ***Pan-European account. Source: GGK

GREY ADVERTISING

Clients:	U.S.	Canada	Argentina	Barbados*	Brazil*	Chile	Colombia*	El Salvador*	Guatemala*	Jamaica*	Mexico	Panama*	Peru	Puerto Rico	Uruguay	Venezuela	Austria	Belgium	Czechoslovakia	Denmark	Finland	France	Germany	Greece*	Hungary	Italy	Netherlands	Norway	Poland	Portugal*	Spain	Sweden	Switzerland	Turkey	U.K.	Israel**	Middle East**	South Africa	Australia	China	Hong Kong	India	Indonesia*	Japan	Malaysia	New Zealand	Pakistan*	Philippines	Singapore	South Korea*	Taiwan	Thailand
Akzo																	●	●		●	●	●	●	●		●	●	●		●	●	●		●																	
Alcoa																					●	●				●				●	●	●		●																	
Argentaria	●																●	●			●	●				●	●			●	●	●		●																	
Armor All																		●			●	●				●								●																	
Bassetti																					●	●				●				●				●																	
B.A.T.				●						●							●	●	●	●	●	●	●	●	●	●	●		●		●		●	●							●	●			●					
Bausch & Lomb	●	●																														●											●							
Bayer					●												●	●								●	●			●	●			●								●	●	●	●						
Block Drugs	●		●		●					●				●			●	●	●			●	●			●	●			●	●		●									●		●		●	●	●			
Boehringer-Ingelheim	●																					●				●	●																								
Bongrain					●													●				●					●																								
Boots																																		●								●		●	●		●			●		
Borden	●							●				●		●																																						
BP																	●	●	●	●		●	●	●	●	●	●		●	●	●	●	●	●			●															
Bristol-Myers Squibb	●						●			●				●	●								●				●															●				●	●						
Cadbury Beverages					●	●		●			●		●	●							●																															
Canon	●	●															●	●				●	●	●				●	●			●	●									●				●					
Caterpillar Overseas																		●			●	●	●	●				●	●			●	●																	
Central Point Software																							●					●	●			●																			
Ceira (Taiwan)	●																					●	●																												●	
Ciba-Geigy	●					●									●	●				●	●																														
Clairol	●									●				●																																					
Copper Association																							●			●				●				●																	
Corning	●		●							●					●			●					●			●								●																	
CPC International																							●									●																	
Digital																										●					●			●	●															
Diners Club			●																●				●															●													
EEC Linen																		●		●			●	●			●	●			●																			
Emirates Airlines																							●	●			●								●															
Ernst & Young	●													●								●																													
Eurocos	●																●	●	●				●		●	●	●		●		●	●		●															
Fruit of the Loom	●	●																					●	●			●																							
Gov't of India Tourism																					●	●	●				●		●			●		●															
GTE Sylvania																	●	●				●					●	●			●	●		●															
Hasbro	●																●					●	●																											
Hoffmann-La Roche	●	●																				●	●				●					●		●															
Hyster Europe																		●				●	●				●	●			●				●															
ICI Pharmaceuticals	●																						●				●								●															
ICL																	●			●	●	●	●				●					●																	
Indofood	●																																						●	●	●				●			●	●		
Intl. Olympic Committee	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●				●	●	●	●	●	●	●	●	●	●	●	●	●
Johnson & Johnson	●														●													●																							
Kabi	●																	●								●							●		●														
Kraft General Foods	●	●										●									●		●			●																								
Mars	●					●											●	●				●	●				●							●																
Mazda																					●																													
Melitta																	●	●	●	●	●	●	●		●		●		●		●																		
Merck Sharp & Dohme	●			●		●				●													●																											
Mitsubishi	●		●			●												●					●																											
Nike			●																			●	●																											
Nissan											●		●								●	●																											
Nokia																	●	●			●	●	●					●		●				●															
Olympic Centennial Coins	●																●	●				●	●				●	●	●			●		●															
Perstorp																					●	●				●																							
NV Philips																															●			●														
Playtex	●	●																				●									●																	
Procter & Gamble	●	●	●	●	●	●	●	●		●	●		●	●		●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●		●	●	●		●	●	●	●	●	●	●	●
Quincentennial Foundation	●																					●										●																	
Remington	●	●																				●	●																			●		●		●					
Rorer																					●		●																			●									
Samsonite																	●	●			●		●			●			●		●																		
Sandoz	●																	●				●																												
Schering-Plough		●	●																			●	●					●																					●
Seagram	●					●											●																																
Siemens																	●	●			●		●																											
Slim-fast Foods	●	●								●							●				●																													
SmithKline Beecham	●	●							●	●				●			●	●	●	●	●	●	●	●		●	●			●																			
Software Publishing																		●			●	●				●	●			●	●	●		●															
Texaco			●			●	●	●						●	●																																		
3M	●		●																							●	●			●																		
VF Corp.	●																●	●		●	●	●	●				●								●														
Warner Bros.	●	●														●						●	●																											
Wm Wrigley Jr.		●																																						●	●			●	●			●		

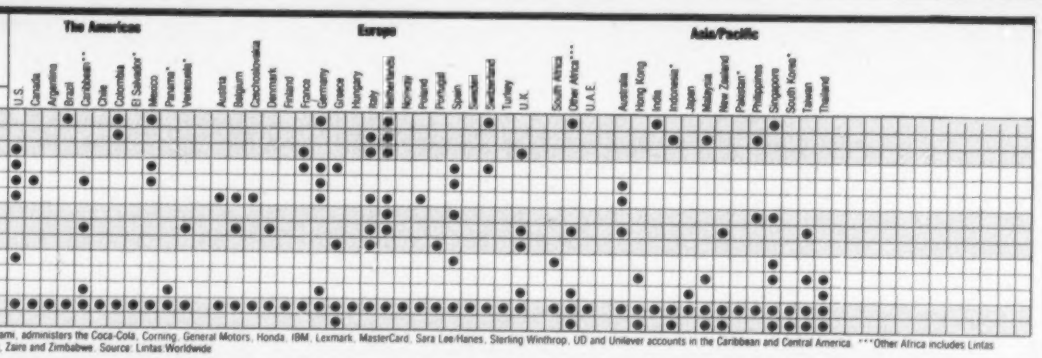
*Non-equity affiliation. **Middle East comprises affiliates in Kuwait, Saudi Arabia and United Arab Emirates. Source: Grey Advertising

LINTAS: WORLDWIDE

Clients:	U.S.	Canada	Argentina	Brazil	Caribbean**	Chile	Colombia	El Salvador*	Mexico	Panama*	Venezuela*	Austria	Belgium	Czechoslovakia	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Poland	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	South Africa	Other Africa***	U.A.E.	Australia	Hong Kong	India	Indonesia*	Japan	Malaysia	New Zealand	Pakistan*	Philippines	Singapore	South Korea*	Taiwan	Thailand
B.A.T.				●						●					●						●										●					●												●		
Bata						●																										●						●					●							
Baulmecke															●				●				●				●			●													●								
Bayer				●	●									●					●	●			●	●					●	●													●								
Chefaro					●					●					●	●	●		●	●			●	●					●	●													●	●							
Citicorp/Diners															●	●			●				●																					●								
Coca-Cola	●	●	●	●	●	●	●		●			●	●		●	●	●	●	●		●	●	●		●	●	●	●	●	●			●			●	●	●	●	●	●	●	●	●	●			●	●	
Corning					●	●	●			●									●	●										●	●													●							
Arthur S. DeMoss					●	●		●													●	●																												
Fiat						●													●						●					●																				
General Motors, incl. components	●	●			●																●	●								●																				
Heineken															●			●	●		●	●	●				●	●		●			●																
Honda	●				●										●																																			
IBM	●				●			●		●					●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●																			
ICI		●						●								●																		●	●	●		●	●	●		●	●	●	●				
InterContinental Hotels			●														●		●																●															
Johnson & Johnson	●	●		●									●		●	●		●	●	●		●	●	●			●	●	●						●	●	●		●	●	●		●	●	●	●	●			
Lexmark	●	●				●										●																			●	●					●								
MasterCard/Eurocard	●				●		●		●		●		●		●																			●			●	●		●			●		●	●	●			
Minolta													●	●		●	●			●	●	●	●						●																				
NEC													●							●								●																					
Nestle	●	●			●	●				●			●	●	●	●	●	●	●			●	●	●				●				●			●	●													
Pfizer											●																											●		●	●								

(Chart continues on next page)

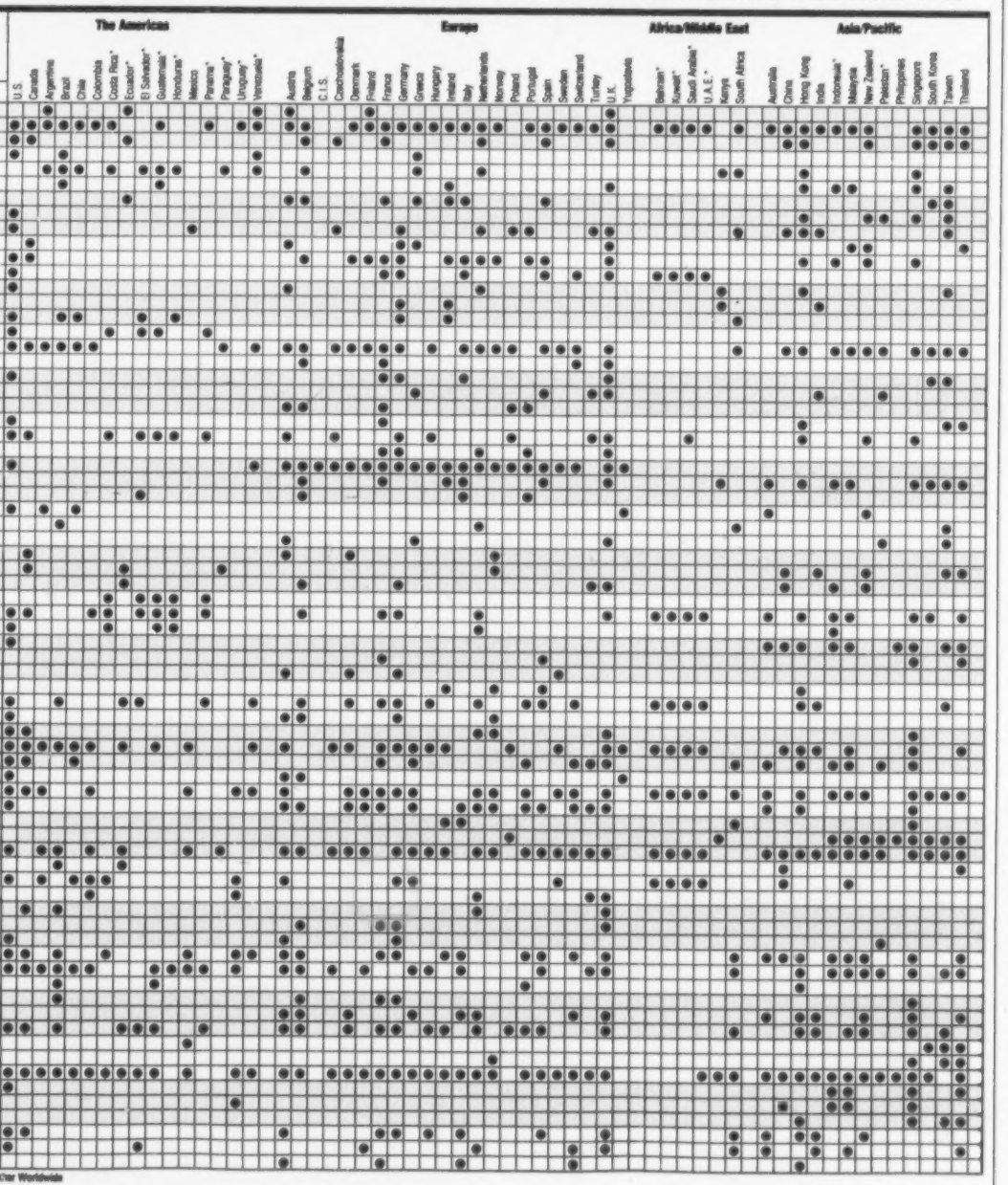
LINTAS:WORLDWIDE (continued)



*Non-equity affiliation. **GS&B Lintas, Miami, administers the Coca-Cola, Corning, General Motors, Honda, IBM, Lexmark, MasterCard, Sara Lee/Hanes, Sterling Winthrop, UD and Unilever accounts in the Caribbean and Central America. ***Other Africa includes Lintas offices in Ghana, Malawi, Namibia, Nigeria, Zaire and Zimbabwe. Source: Lintas Worldwide

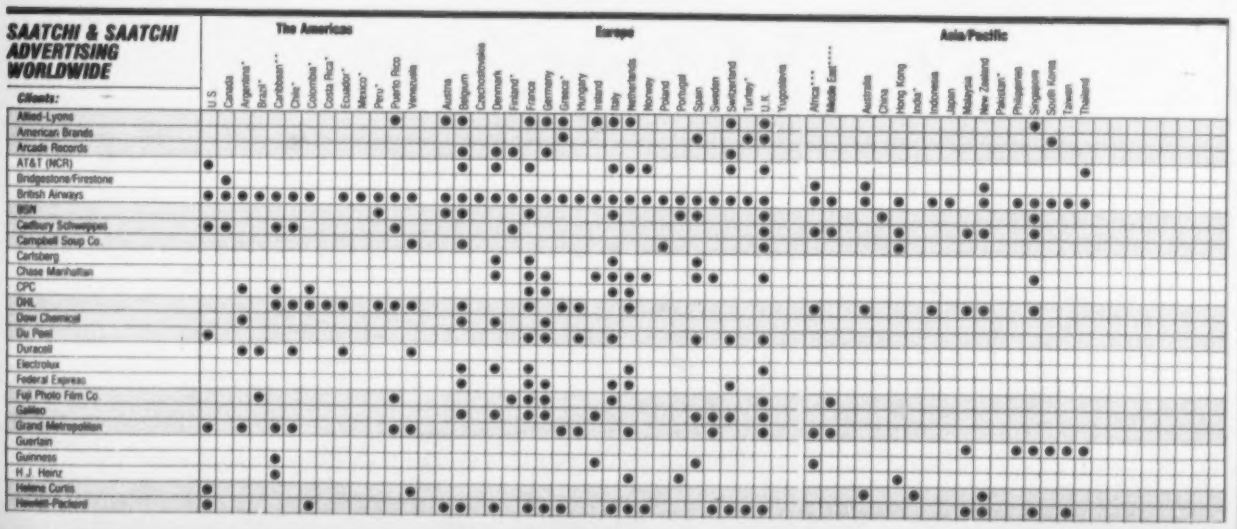
DUE TO ITS GREATER WIDTH, THE CHART FOR McCANN-ERICKSON BEGINS ON PAGE S-6.

OGILVY & MATHER WORLDWIDE



*Non-equity affiliation. Source: Ogilvy & Mather Worldwide

SAATCHI & SAATCHI ADVERTISING WORLDWIDE



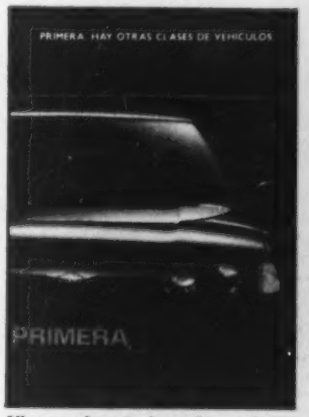
(Chart continues on Page S-6)

Japanese

(Continued from Page S-4)

to the Nissan Europe headquarters it set up two years ago in Amsterdam. TBWA has formed a joint venture with Hakuhodo, called TBWA-Neth, to handle Nissan's pan-European brand image account. Nevertheless, Nissan uses 15 different agencies for local advertising in 13 European countries.

"We want better brand awareness as a European carmaker," said Itsuro Wakatsuki, deputy general manager, European & U.S. Operations Group, Overseas Business Planning Division, at Nissan. "We are convinced that if we launch products that meet the needs of European customers and promote localization in all our operations, we will eventually be accepted as a truly European maker."



Nissan aims to launch products meeting the needs of European customers and become accepted as a European carmaker.

Mr. Wakatsuki said Nissan was the top Japanese car marketer in Europe last year, with a 3.7% market share, up from 3.4% in 1990. He predicted Nissan's European market share could be close to 5% in about 10 years.

Being accepted in Europe is important to Japanese auto marketers, which have suffered more from anti-Japanese feeling than most other marketers.

Japanese car companies have only about 12% of Europe's 14 million-unit car market, but their sales have been kept low by local quotas such as a 3% ceiling on Japanese cars' share of the French market.

Survey shows resistance

The vast majority of Europeans are willing to buy Japanese brands in product categories in which Japanese products are well-known and considered high quality, according to a recent survey by Bozell Europe of its own employees in 14 countries. Favored categories included cameras, computers, fax machines, motorcycles and audio and video equipment.

However, the survey found resistance to Japanese products in a number of categories where those goods are are almost unknown to Europeans.

For example, 89% of respondents said they wouldn't be willing to buy Japanese coffee and 80% wouldn't buy Japanese beer. Between 70% and 80% said they wouldn't buy Japanese over-the-counter medicines, liquor, cookies, laundry detergents or household cleaners,

(Continued on Page S-6)

Unpopular products

Japanese goods Europeans don't want.

Product	% unwilling to buy
Coffee	89%
Wine	85%
Beer	80%
Canned food	76%
Over-the-counter medicines	73%
Liquor	72%
Cookies, candies or confections	72%
Laundry detergent, household cleaners, soap	71%
Toothpaste, deodorant, hair spray, mouthwash	71%
Soft drinks	69%
Cosmetics or perfume	66%
Credit card services	64%
Furniture	62%
Bank or investment company	61%

Source: Bozell

Japanese

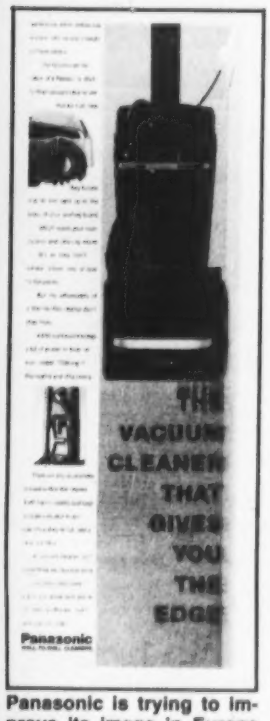
(Continued from Page S-5)

toothpastes or deodorants.

Questionnaires were distributed last fall to Bozell employees in 14 European countries, generating about 500 responses. Margin of error is plus or minus 5 percentage points.

For marketers of Japanese goods not favored by Europeans, such as package goods, developing the product takes priority over building a brand name. Many are looking into special formulas for their new customers. For example, the Kao Europe Research Institute is researching chemicals for products uniquely suited to European consumers, a Kao spokesman said.

"We need to be able to develop products that offer real benefits to European consumers and that are necessarily different from those in Japan," the spokesman said. "When we achieve this, we will initially be able to introduce improved products via our Goldwell and Guhl subsidiaries, and longer term under the Kao brand names."



Panasonic is trying to improve its image in Europe by increasing the frequency with which it exposes consumers to its name.

Matsushita Electric Industrial Co. is also looking to improve the standing of its Panasonic brand.

"Europe is rather weak for us overall in terms of the Panasonic brand image," said Toby Toyama, general manager, International Account Executive Department, Corporate Advertising Division. "We need to increase the frequency with which people are exposed to our name."

Matsushita is trying to develop the use of "Panasonic, the way ahead" as an advertising slogan across Europe and has signed sprinter Carl Lewis in connection with its sponsorship of the Olympics this year.

To project a coordinated image, Matsushita has offered to supply photos and film footage for locally created ads.

NV Philips, which used to regard Japanese competition in European consumer electronics as the biggest threat to its survival, has mellowed.

"Our policy has changed through the years," a Philips Electronics spokesman said. "In earlier years, we had problems with them, as when they tried to conquer the market through price dumping, but now we are not afraid of them at all."

Meanwhile, ad agencies see new-business opportunities developing. McCann-Erickson's new unit under Mr. Wilk is one example.

The Euro-Japan unit's mission is to develop links with Japanese companies operating in Europe and help European companies interested in doing business in Japan. The unit won't handle clients directly but will help McCann offices develop and retain business.

McCann also plans to conduct a major study

(Continued on Page S-8)

SAATCHI & SAATCHI ADVERTISING WORLDWIDE (continued)

Clients:	The Americas: U.S.	Canada	Argentina*	Brazil*	Caribbean**	Chile*	Colombia*	Costa Rica*	Ecuador*	Mexico*	Peru*	Puerto Rico	Venezuela	Europe: Austria	Belgium	Czechoslovakia	Denmark	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	Yugoslavia	Africa***: Kenya	South Africa	Zambia	Zimbabwe	Asia/Pacific: Australia	China	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea	Taiwan	Thailand
Hilton Intl.				●										●				●	●				●						●			●								●		●			●	●		●			
ICI	●														●	●			●	●				●								●																		
Johnson & Johnson	●	●			●		●		●		●	●		●	●		●		●	●	●			●	●	●	●			●	●	●			●							●	●				●			
Mars												●							●				●				●					●																	
NZ Dairy Board					●																											●													●				
Oce																●		●		●					●	●					●																		
PepsiCo					●						●	●							●																														
NV Philips							●							●					●																													●		
Pirelli				●											●				●			●	●																										
Procter & Gamble	●	●			●						●			●	●	●	●	●	●	●	●	●	●	●	●	●			●	●	●	●			●	●							●	●	●	●	●	●	●	●
Reckitt & Colman					●										●		●		●		●	●			●			●																				
Red Cross			●				●																						●			●																
Samsung	●				●														●	●		●							●																				
Sandoz															●				●			●	●						●	●	●																		
Sara Lee	●											●			●				●							●				●			●			●							●				●		
Seiko															●	●														●	●			●															
Shell					●								●						●																														
SMH/Swatch	●												●						●						●																								
Stanley Tools															●	●		●							●					●	●			●															
Terumo															●			●	●						●					●				●															
Toyota	●	●		●	●							●						●	●								●						●											●		●		●		
Visa International																																	●																
Yamaha	●	●				●															●				●								●											●					

*Non-equity affiliation. **Caribbean includes Barbados, Dominican Republic, Jamaica and Trinidad. ***Africa includes Kenya, Nigeria, South Africa and Zimbabwe. ****Middle East includes Bahrain, Egypt, Morocco and Saudi Arabia
Source: Saatchi & Saatchi Advertising Worldwide

J. WALTER THOMPSON CO.

Clients:	The Americas: U.S.	Canada	Argentina	Brazil	Chile	Colombia*	Dom. Republic	Ecuador	Guatemala	Mexico	Paraguay	Peru	Puerto Rico	Uruguay*	Venezuela	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Greece	Ireland	Italy	Netherlands	Norway*	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	South Africa	Asia/Pacific: Australia	China	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Pakistan	Philippines	Singapore	South Korea	Sri Lanka	Taiwan	Thailand
Allstate													●					●		●	●			●						●																			
Bacardi Corp.			●														●					●			●		●	●																				
Bell Atlantic	●																			●				●					●		●																		
Citicorp	●													●									●																										
Deltaers		●		●						●							●	●	●	●	●			●	●			●	●			●																
Eastman Kodak	●	●	●	●	●	●		●		●		●	●	●	●		●		●	●	●	●	●	●	●	●		●	●	●	●	●			●	●							●	●				
Exxon**			●	●	●	●			●	●	●																				●	●																
Ford Motor Co.	●		●		●		●			●			●																					●	●			●				●						
Gerber Products Co.					●		●					●		●						●																												
Grand Metropolitan									●					●								●	●							●																		
Heineken																				●			●	●	●	●		●		●																		
IBM		●	●						●		●	●		●																																		
S.C. Johnson & Son			●	●	●	●	●		●	●		●		●																																	
Kellogg	●	●	●	●	●				●		●			●			●	●	●	●	●	●		●	●			●	●	●	●	●			●													
Kraft General Foods	●	●			●				●		●	●		●			●	●	●		●	●		●	●			●	●	●	●	●			●													
McDonnell Douglas Corp.	●	●	●		●									●			●	●	●	●	●			●				●	●	●	●																	
Nabisco Brands	●		●	●			●	●		●		●	●	●																																	
Nestle	●		●	●	●	●		●	●		●	●					●	●		●					●	●	●	●	●	●	●	●															
Northern Telecom	●	●	●	●	●				●				●	●						●	●																										
Northwest Airlines	●																			●	●																										
PepsiCo		●									●	●	●	●							●																										
NV Philips				●	●						●		●																																		
R.J. Reynolds		●								●			●																																		
Rolex Watch	●	●	●	●								●	●	●	●	●	●	●	●	●	●	●	●	●	●	●																					
Scott Paper		●								●											●																										
Seagram																●					●																										
SmithKline Beecham					●						●																																				
Sterling Drug	●		●										●																																		
Tennessee Automotive	●									●						●	●	●		●		●					●	●	●																		
Unilever	●	●	●	●	●	●		●	●	●	●	●				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●														
Warner-Lambert	●	●														●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●														

*Non-equity affiliation. **The Exxon account is also handled in 16 Caribbean countries. Source: J. Walter Thompson Co.

YOUNG & RUBICAM

Clients:	The Americas: U.S.	Canada	Argentina	Brazil	Chile	Colombia	Costa Rica*	Dom. Republic*	Ecuador*	Guatemala*	Mexico	Peru*	Puerto Rico	Trinidad*	Uruguay*	Venezuela	Europe: Austria	Belgium	C.I.S.	Czechoslovakia	Denmark	Finland	France	Germany	Greece	Hungary	Ireland*	Italy	Netherlands	Norway	Poland	Portugal	Romania*	Spain	Sweden	Switzerland	Turkey	U.K.	Africa: Kenya	South Africa	Zambia	Zimbabwe	Asia/Pacific: Australia	China	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea	Taiwan	Thailand
Ada	●	●		●													●	●			●		●				●	●	●		●			●		●		●														
Adidas	●	●	●	●	●	●					●						●	●		●	●	●	●		●	●		●	●	●	●		●	●	●	●	●	●					●		●	●	●	●	●	●	●	●
American Home Products	●	●						●			●		●			●		●					●								●	●		●	●	●	●										●					
Andersen Consulting	●	●	●																				●														●														
AT&T	●	●					●			●						●		●					●								●	●			●	●														
Bausch & Lomb/Ray-Ban		●	●	●	●	●		●	●	●	●		●			●				●	●	●	●		●				●	●		●		●	●	●						●		●	●		●	●	●	●	●
Robert Bosch					●						●							●	●			●	●	●		●								●	●	●														
BSN					●						●							●		●			●	●	●	●	●					●																	
Citicorp					●	●						●		●	●																																		
Colgate-Palmolive	●	●	●	●		●		●			●		●		●	●	●	●	●	●	●	●	●			●				●			●	●	●	●			●	●	●	●		●	●	●	●	●	●	●	●
Du Pont	●	●	●	●		●					●				●				●		●		●			●				●			●	●	●	●						●	●	●	●	●	●	●	●	●
Eastman Kodak	●	●						●									●	●		●		●		●		●			●		●		●		●			●					●								
Ford	●	●							●												●		●												●															
Grand Metropolitan																											●									●															
H.J. Heinz																	●																●		●															
Holiday Inn	●	●									●						●																			●															
Jacobs Suchard			●														●	●					●	●	●	●			●	●	●																			
Johnson & Johnson	●	●	●	●	●			●				●	●	●			●	●	●							●			●	●				●	●					●	●										
Kentucky Fried Chicken	●	●			●				●		●		●	●								●				●	●																							
Kraft General Foods	●	●		●									●				●					●	●	●						●	●																		
Metropolitan Life	●	●									●																																						
Monsanto/Searle	●											●			●								●	●		●																							
Motorola																	●								●	●			●																			
Nintendo																										●	●			●																		
PepsiCo Foods Intl.		●		●				●		●		●					●																●	●	●	●														
Pernod-Ricard																	●																																
Quaker Oats																	●			●			●																										
Reckitt & Colman			●					●			●			●			●							●	●				●																				
Royal Canadian Mint	●	●																						●																								
Royal Dutch/Shell Group								●					●																●																			
Sony													●			●			●	●	●			●				●			●																		
United Intl. Pictures																●		●			●	●	●					●	●																				
Warner-Lambert	●				●			●								●																																
Xerox	●	●		●	●			●	●	●							●	●				●	●	●					●	●	●																

*Non-equity affiliation. Y&R uses the Dentsu, Young & Rubicam network for all countries in the Pacific region except Australia and New Zealand. Source: Young & Rubicam

McCANN-ERICKSON WORLDWIDE

| Clients: | The Americas: U.S. | Canada | Argentina | Barbados | Bolivia* | Brazil | Chile | Colombia | Costa Rica | Dom. Republic | Ecuador | El Salvador* | Grand Cayman* | Guadeloupe* | Guatemala | Haiti* | Honduras | Jamaica | Martinique* | Mexico | Nicaragua* | Panama | Paraguay* | Peru | Puerto Rico | Trinidad | Uruguay | Venezuela | Europe: Austria | Belgium | C.I.S. | Croatia | Czechoslovakia | Denmark | Finland | France | Germany | Greece | Hungary | Ireland | Italy | Netherlands | Norway | Poland | Portugal | Spain | Sweden | Switzerland | Turkey | U.K. | Africa/Middle East: Bahrain* | Cameroon* | Egypt* | Iran* | Ivory Coast | Kenya* | Kuwait* | Lebanon* | Mauritius* | Morocco | Nigeria* | Oman* | Saudi Arabia* | Senegal* | South Africa | Tunisia | U.A.E. | Asia/Pacific: Australia | China | Hong Kong | India* | Indonesia* | Japan | Malaysia | New Zealand | Pakistan* | Philippines | Singapore | South Korea | Taiwan | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---

McCANN-ERICKSON WORLDWIDE (continued)

Clients:	The Americas: U.S.	Canada	Argentina	Barbados	Belize*	Bolivia*	Brazil	Chile	Colombia	Costa Rica	Dom. Republic	Ecuador	El Salvador	Grand Cayman*	Guatemala*	Guyana*	Haiti*	Honduras	Jamaica	Martinique*	Mexico	Nicaragua	Panama	Paraguay*	Peru	Puerto Rico	Trinidad	Uruguay	Venezuela
Europcar																													
Exxon/Esso	●				●					●			●	●						●		●		●			●			
General Motors	●	●	●				●	●		●			●							●			●		●	●	●	●		
Gillette	●			●	●		●	●	●	●	●	●	●		●	●		●	●	●	●	●	●	●	●	●	●	●	●	
Golden Lady																													
Goodyear		●	●	●		●	●	●	●	●		●	●		●			●	●		●		●	●	●		●		●
Heineken			●	●			●			●																	●		
Hennes & Mauritz																													
Heublein	●																		●										
Hilton/Conrad Intl	●																									●		●	
IBM			●																								●		
Interbrew																													
Johnson & Johnson	●	●	●	●						●	●			●			●	●		●			●		●		●		
Lee Jeans			●			●	●	●		●				●						●			●				●		
Lego Toys			●			●	●		●											●		●					●		
London Intl. Group (Durex)	●																												
L'Oreal	●	●	●	●		●	●	●	●		●	●		●			●	●		●			●	●	●	●	●	●	
Lufthansa	●					●				●															●				
Martini & Rossi	●		●			●	●	●		●	●											●			●	●	●	●	
McDonald's	●						●																				●		
Mennen	●	●	●	●		●	●		●	●		●		●						●			●	●	●		●		
J.A. Mont																													
Nestle	●	●	●			●	●	●	●	●	●	●		●				●	●			●		●	●	●	●		
Buitoni	●	●	●																								●		
Carnation	●									●										●		●							
Friskies/Petcare	●																							●					
Maggi/Culinary			●							●	●																●		
Nestle Coffees	●	●				●	●			●										●		●		●	●		●		
Nordica	●																												
Pacific Islands Club																													
Perfetti																													
P&G Ferries																													
Puma																													
Suchard																													
Raleton Energy Systems																													
Reckitt & Colman							●																						
RJR Nabisco	●	●				●					●													●	●	●				
RJR Tobacco																											●		
San Miguel																													
SmithKline Beecham			●											●				●	●							●			
Sony											●																		
Levi Strauss		●								●		●			●												●	●	
Tiffany & Co.																													
Thai Tourism Authority																													
Unilever	●	●	●			●	●													●		●		●	●		●	●	
United Distillers						●	●																				●		
UPS																				●		●			●				
U.S. Potato Board		●																											
Washington State Apple Comm.	●																			●				●					
Waterman Pens	●					●	●	●												●				●			●		
WD-40	●	●							●															●					
World Gold Council						●																							
Yoplait																											●		

Clients:	Europe: U.S.	Austria	Belgium	C.I.S.	Croatia	Czechoslovakia	Denmark	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	Africa/Middle East: Bahrain*	Cameroon*	Egypt*	Iran*	Ivory Coast*	Kenya	Kuwait*	Lebanon*	Mauritius	Morocco	Nigeria*	Oman*	Saudi Arabia*	Senegal*	South Africa	Tunisia	U.A.E.	Asia/Pacific: Australia	China	Hong Kong	India	Indonesia*	Japan	Malaysia	New Zealand	Pakistan*	Philippines	Singapore	South Korea	Taiwan	Thailand
Europcar																																																					
Exxon/Esso	●																																																		
General Motors	●																																																			
Gillette	●																																																			
Golden Lady																																																				
Goodyear																																																				
Heineken																																																				
Hennes & Mauritz																																																			
Heublein																																																				
Hilton/Conrad Intl																																																			
IBM																																																				
Interbrew																																																				
Johnson & Johnson																																																			
Lee Jeans																																																			
Lego Toys																																																			
London Intl. Group (Durex)																																																			
L'Oreal																																																			
Lufthansa																																																			
Martini & Rossi																																																			
McDonald's																																																			
Mennen																																																			
J.A. Mont																																																			
Nestle																																																			
Buitoni																																																			
Carnation																																																			
Friskies/Petcare																																																			
Maggi/Culinary																																																			
Nestle Coffees																																																			
Nordica																																																			
Pacific Islands Club																																																			
Perfetti																																																			
P&G Ferries																																																			
Puma																																																			
Suchard																																																			
Raleton Energy Systems																																																			
Reckitt & Colman																																																			
RJR Nabisco																																																			
RJR Tobacco																																																			
San Miguel																																																			
SmithKline Beecham																																																			
Sony																																																			
Levi Strauss																																																			
Tiffany & Co.																																																			
Thai Tourism Authority																																																			
Unilever																																																			
United Distillers																																																			
UPS																																																			
U.S. Potato Board																																																			
Washington State Apple Comm.																																																			
Waterman Pens																																																			
WD-40																																																			
World Gold Council																																																			
Yoplait																																																			

*Non-equity affiliation. Source: McCann-Erickson Worldwide

AGENCIES WITH OFFICES IN FEWER THAN 31 COUNTRIES

AYER INC.

Clients:	U.S.	Guatemala*	Austria*	Denmark*	France	Germany	Greece*	Hungary	Italy	Netherlands	Norway*	Portugal	Spain	Sweden*	Switzerland	Turkey*	U.K.
AT&T	●				●	●			●	●			●				
Beiersdorf						●	●	●	●	●				●	●		
Iberia Airlines		●		●	●	●			●	●			●			●	
Nobel						●			●			●	●				●
Ricoh				●	●	●			●	●			●				●
SEAT						●			●	●		●	●	●			●

*Non-equity affiliation. Source: Ayer Inc.

BDDP

Clients:	U.S.	Canada*	Mexico*	Austria*	Belgium	Denmark*	Finland*	France	Germany	Italy	Netherlands	Norway*	Portugal	Spain	Sweden*	Switzerland*	U.K.	Cameroon*	Ivory Coast*	Kenya*	Senegal*	Australia	Hong Kong	Japan*	Malaysia	New Zealand*	Philippines	Singapore	Taiwan
BSN Gervais Danone					●			●	●	●	●			●			●												
Hasbro-Milton Bradley					●			●	●	●	●			●			●												
Hertz	●							●	●					●			●												
Marine Power				●		●	●	●	●		●	●		●		●	●												
Metra Telephone								●	●					●															
Merlin Gerin		●	●		●			●	●		●						●					●							
Michelin				●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●								
Polaroid					●			●	●	●	●		●	●	●	●	●												●
Reckitt & Colman	●							●	●					●			●												
Simplesse						●	●	●	●								●												
Singapore Airlines	●	●		●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Singapore Civil Aviation									●								●												●
Singapore Tourism Board	●	●				●	●	●	●		●				●		●					●	●	●	●	●	●	●	●
TAG-Heuer watches	●	●			●			●	●	●	●					●	●					●	●						●
Tiger Balm	●	●							●	●	●						●					●	●		●	●	●	●	●

*Non-equity affiliation. Source: BDDP

DENTSU INC.

Clients:	U.S.	Germany	Italy	U.K.	Australia	Japan	Singapore
Canon	●	●			●	●	
Japan Air Lines	●	●		●	●	●	●
Shiseido	●		●		●	●	●
Sony		●	●		●	●	●

Source: Advertising Age

DENTSU, YOUNG & RUBICAM PARTNERSHIPS

Clients:	U.S.	Australia	China	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea	Taiwan	Thailand
Adidas				●	●	●	●	●		●	●		●	●
Air New Zealand	●		●				●		●					
AT&T	●			●	●		●			●	●	●	●	
Bausch & Lomb					●		●						●	●
Colgate-Palmolive	●			●	●	●	●		●		●			●
Du Pont				●	●	●	●	●				●	●	●
Federal Express	●		●	●	●				●	●	●	●	●	●
Holiday Inn				●	●			●				●	●	●
Kentucky Fried Chicken	●			●	●	●		●		●	●		●	●

(Chart continues in next column)

DENTSU, YOUNG & RUBICAM PARTNERSHIPS (cont'd)

Clients:	U.S.	Australia	China	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea	Taiwan	Thailand
Royal Canadian Mint				●			●	●			●		●	
Shell				●			●				●	●		
Warner-Lambert					●		●			●				●

*Non-equity affiliation. Source: Dentsu, Young & Rubicam Partnerships

EURO RSCG

Clients:	U.S.	Canada	Austria	Belgium	Czechoslovakia	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	Morocco	Australia	Hong Kong	Malaysia	Singapore	Taiwan	Thailand
B.A.T	●																					●		●	●	●	●
BSN				●		●		●	●	●		●		●	●	●	●					●		●	●		
Cadbury Schweppes								●		●									●	●					●	●	
Candia				●				●			●				●												
Cartier								●	●										●								
Chanel								●	●		●	●			●												
Citroen				●	●			●	●		●	●			●	●		●									
Club Mediterranee				●	●			●	●	●		●			●	●		●			●						
Elf								●	●						●	●			●								
France Telecom	●				●			●		●																	
Jacobs Suchard				●				●	●						●												
Kleber					●			●	●			●															
L'Oreal					●		●	●				●	●		●	●						●					
Maple Leaf												●			●	●	●	●									
Mouliinex				●	●						●	●															
Nestle	●							●				●							●								
Parker Pen	●			●	●			●	●		●	●			●		●	●	●			●	●	●	●	●	●
Peugeot				●	●		●	●			●	●			●	●	●	●					●				
Mr Philips						●		●										●					●		●		
Procter & Gamble	●	●						●	●		●		●		●		●		●								
Sara Lee					●			●	●		●								●				●	●			
Sega	●							●										●	●								
Siemens				●				●											●				●				
SmithKline Beecham	●			●				●									●										
Sony				●		●	●	●																			
Tambrands				●	●			●	●	●	●	●		●	●	●	●	●	●								
TDK				●				●	●			●				●											
3M				●				●	●			●				●											
United Distillers				●	●			●	●			●				●			●								
World Gold Council																							●	●	●	●	●
Zenith Data Systems	●			●		●		●	●			●	●		●												

*Non-equity affiliation. In some countries, Euro RSCG has both equity and non-equity agencies. Maple Leaf is handled by Euro RSCG's Dolibi agency in Portugal. Sweden and Switzerland: Procter & Gamble is handled by a non-equity shop in Turkey and United Distillers has the same arrangement for Austria, Greece, Netherlands and Portugal. France Telecom has a non equity agency handle its business in Japan, Argentina, Mexico and Poland. Source: Euro RSCG

GROUPE FCA

Clients:	U.S.	Belgium	France	Germany	Italy	Netherlands	Portugal	Spain	Turkey	U.K.
Brotherrin		●	●	●	●	●				●
Le Bourget		●	●	●	●			●		●
Ducros		●	●		●		●	●		
Fine		●	●	●	●	●				●
Fruocani		●	●	●	●	●	●	●		●
Martini & Rossi	●	●		●				●		
Mazda Corporate		●	●	●	●	●	●	●		●
Maroussia L'Oreal		●	●	●	●	●	●	●		●
Nestle	●	●	●			●				●
Phys		●	●	●	●			●		
Royal Canin			●	●	●			●		
Helena Rubinstein		●	●	●	●	●	●			●

(Chart continues on Page S-8)

Japanese

(Continued from Page S-6)

this fall on attitudes of European consumers and business leaders to Japanese products and investment.

Based on some preliminary research, "there is a fairly strong, almost duality of views between respect for Japanese abilities and encroachment on what people feel is their business interest," said Carol Samms, McCann's VP-information services worldwide.

"A lot of Japanese companies are doing corporate advertising that is almost viewed as wallpaper by consumers," Ms. Samms said. "Only two or three brands, including Sony, make themselves distinct from the pack." □

Contributing to this story: David Kilburn, Derek Suchard and Bruce Crumley.

GROUPE FCA (continued)

Europe

Clients:	U.S.	Belgium	France	Germany	Italy	Netherlands	Portugal	Spain	Turkey	U.K.
Thomson			●	●				●		●
TWA			●	●	●	●	●	●	●	●
Ungaro			●	●	●	●	●	●		●
Vichy			●	●	●	●	●	●		●

Source: Groupe FCA

HAKUHODO

	Europe						Asia/Pacific						
Clients:	U.S.	France	Germany	Italy	Netherlands	U.K.	Australia*	Hong Kong	Japan	Malaysia	Singapore	Taiwan	Thailand
ANA	●						●		●				●
Ajinomoto								●	●			●	●
Canon	●				●	●			●				
Hitachi	●					●			●			●	
Isetan								●	●	●	●		●
Kao								●	●	●	●	●	●
Konica				●			●	●	●	●	●		
Matsushita				●				●		●			
NEC	●		●	●		●		●	●	●	●	●	●

*In Australia, NEC is handled by Lintas Hakuhodo Australia, a joint venture. ANA and Konica are handled by agencies with which Hakuhodo has non-equity affiliations. Source: Hakuhodo

LOWE GROUP

	Europe																												
Clients:	U.S.	Canada*	Argentina*	Austria	Belgium	Czechoslovakia*	Denmark*	Finland*	France	Germany	Greece*	Hungary*	Ireland*	Italy	Netherlands	Portugal*	Slovenia*	Spain	Sweden*	Switzerland*	U.K.	Hong Kong*	Japan*	Singapore*
Benetton	●	●	●		●		●	●	●	●			●	●	●			●	●	●	●	●	●	●
Bols						●				●					●			●			●			
Braun	●									●					●			●						
Henkel					●	●			●	●		●			●	●	●	●						
Hoover					●	●		●	●	●		●			●					●				
Johnson & Johnson										●					●		●		●		●			
Quaker					●				●	●					●	●		●						

*Non-equity affiliation. Source: Lowe Group

TBWA

	Europe															Japan*
Clients:	U.S.	Austria	Belgium	Denmark	France	Germany	Greece*	Italy	Netherlands	Portugal*	Spain	Sweden*	Switzerland	Turkey*	U.K.	
Absolut vodka	●				●	●									●	
Barilla			●		●	●	●				●	●	●		●	
Beiersdorf	●			●	●	●	●	●	●	●	●		●	●		
Robert Bosch		●				●		●			●		●			
BSN	●		●					●			●				●	●
Henkel		●	●		●	●		●	●		●					
IDV	●								●		●				●	
Philip Morris Cos.				●		●	●		●						●	
Nissan						●			●		●				●	
Sheraton Hotels				●	●		●		●		●				●	
TAT Airlines					●	●		●							●	

*Non-equity affiliation. Source: TBWA

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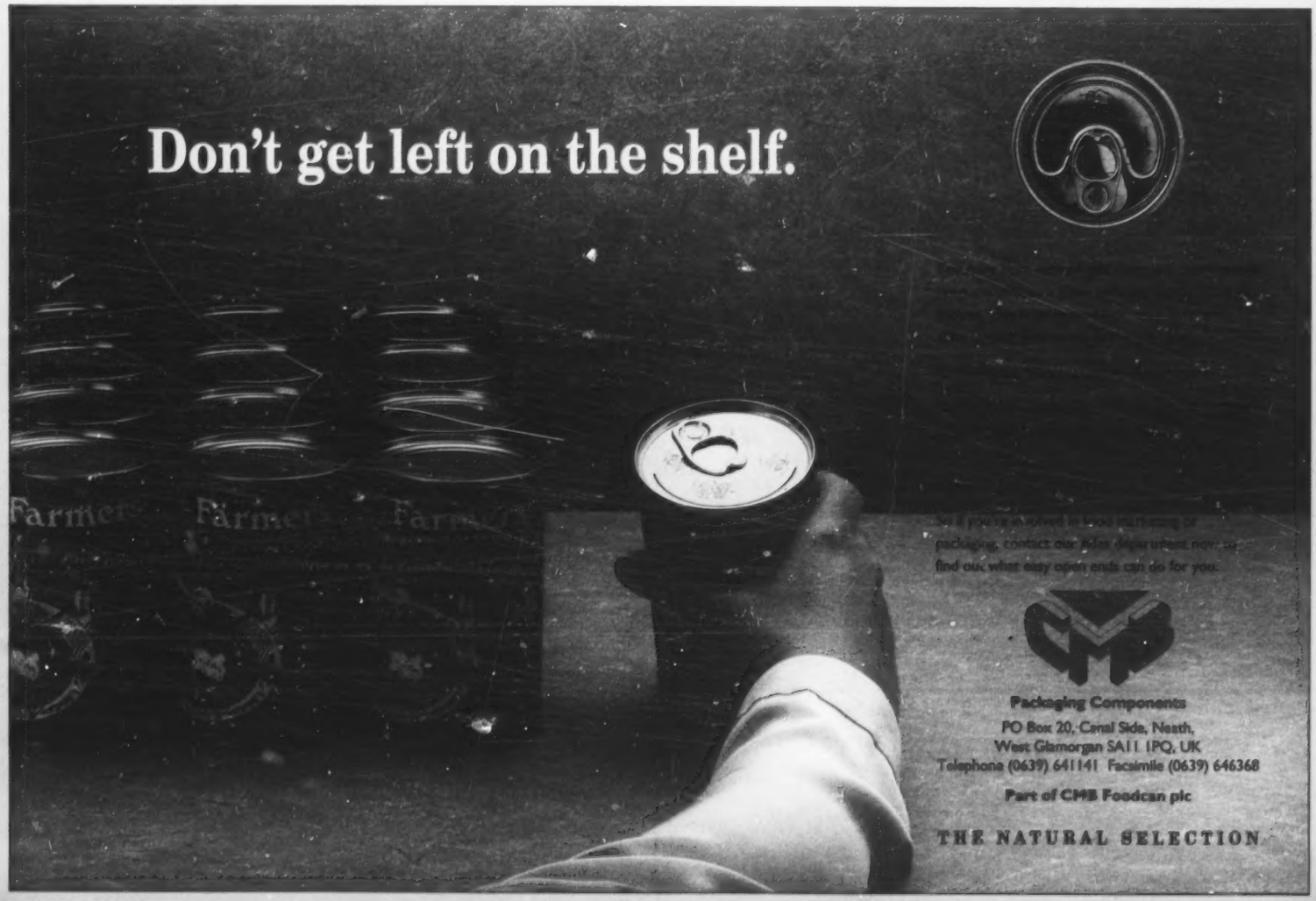
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